

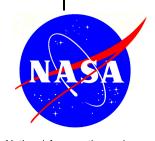
Integrated Financial Management Program

Core Financial

Course Name: Purchasing

Module 4: Request for Quotation/Quotation

Course Guide



Introduction

This guide provides information that will be shared during the training course session.

Course Structure

This course covers the basic SAP functionality that is needed to perform specific activities pertaining to your role. Information beyond the scope of this class may be obtain from the On-Line Quick Reference (OLQR) tool or from designated Super-users.

Trainer Role

A trainer role in this training session is to:

- Provide end-users with the information they will need to learn the new skill set
- Provide end-users with guidance and coaching as they learn the new skills
- Maximize the hands-on practice time
- Ensure the objectives of the module are met
- Answer questions as completely as possible

End-user Role

An end-user's role in this training session is to:

- Participate in order to understand new roles, SAP concepts, processes, and principles presented
- Ask questions, when clarification is needed
- Complete all activities/exercises

Module Significance

SAP provides an automated means to prepare and communicate solicitations, and evaluate quotes and proposals. Learning this process will enhance the skills of end-users and reduce the clerical burden that is currently levied on the procurement professional.

Module Structure

This module is structured so that the amount of hands-on practice utilizing SAP is maximized. Each of the topics is organized around the following structure:

Content

Lecture material is provided by the trainer on new roles, SAP concepts, processes, and principles.

Content Review

The trainer reviews key topic information at the conclusion of each topic.

Scenario

The trainer provides a description of a typical situation that will be used to practice the business activity within SAP.

Scenario Example: A Receiver in the Purchasing department is responsible for physically receiving and verifying that goods or services have been delivered. A shipment of goods has just arrived into the office, display the procurement documents and record the receipt of goods.

Demonstration

Trainer shows end-users how to perform the business activity in SAP.

Exercise

End-users practice the activity in the SAP training database.

Agenda

- Introduction 0:15 hr
- Background Knowledge 0:10 hr
- Topic 1: Generate Solicitation 1:45 hr
 - Activity 1: Assign Buyer 0:10 hr
 - Activity 2: Perform Market Research and Review Estimated Value 0:20 hr
 - Activity 3: Generate Solicitation Document 0:40 hr
 - Activity 4: Communicate Solicitation 0:35 hr
 - Topic 2: Amend and Cancel Solicitation 0:40 hr
 - Activity 1: Amend Solicitation 0:10 hr
 - Activity 2: Communicate Solicitation Amendment 0:10 hr
 - Activity 3: Cancel Solicitation Amendment 0:10 hr
 - Activity 4: Cancel Solicitation 0:10 hr
- Topic 3: Evaluate Offers –0:30 hr
 - Activity 1: Receive Proposals 0:20 hr
 - Activity 2: Perform Evaluation 0:10 hr
- Course Summary 0:15 hr
- Total 3:30 hrs